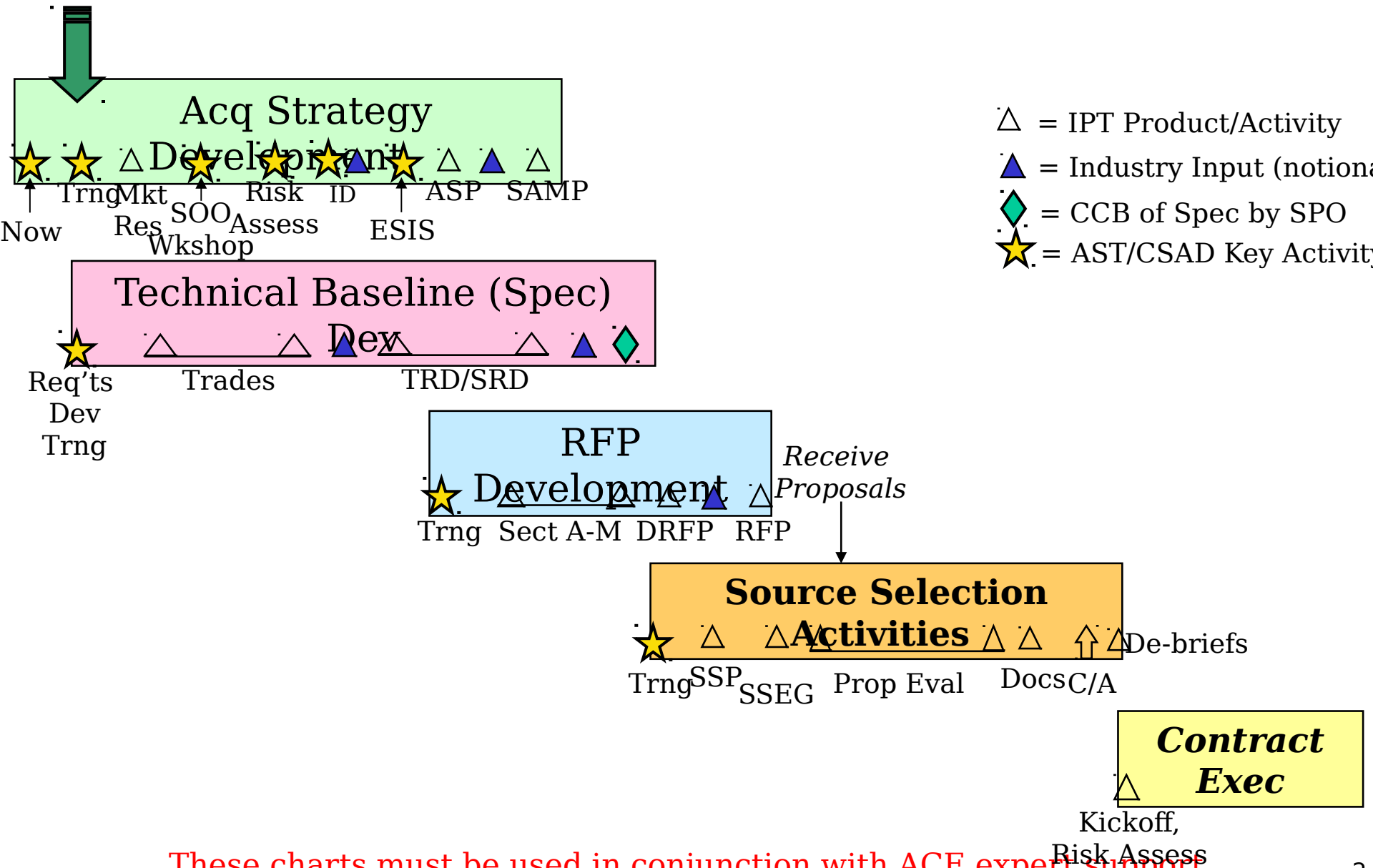




Team Training for the Pre-Award Process

**ACQUISITION CENTER FOR EXCELLENCE
&
CENTER FOR SYSTEMS ACQUISITION DEVELOPMENT**

Pre-Award Process (Top-Level)



Agenda

- **“Around the Room Introductions**
 - **Name, Organization/Company, Function/Expertise on Team**
- **“8 Things to Remember” About Planning a Meeting**
- **Ways to Involve the User**
- **IPT Schedule Alternatives and Template**
- **Workshop: Initial IPT Ground Rules**

Planning A Meeting (pg 1)

- **Purpose/Objective**

- What's the real reason you're meeting?
- Share information/status, solve problem, revise document?

- **Format/Approach**

- To achieve your purpose; do you need a group discussion, information briefing(s), brainstorming, status review, or what?

- **Product(s)**

- What's the output or result? If no product, why meet?

- **Agenda**

- Have one! Send it out well in advance!
- Identify speakers and time allocated to each

Planning A Meeting (pg 2)

- **Attendees**

- Think about who should attend and invite them!
- If people have to travel, they need greater lead time
- If they can't travel, what about a VTC or telecon?
- Send out the agenda with the invitation and ask for confirmation that speakers and/or key attendees will attend

- **Homework**

- Do you want the attendees to read something in advance so they can comment/discuss it at the meeting?
- Do you expect them to send their comments to you before the meeting, then go over the comments you don't understand?

- **Location**

- Select a location that supports the purpose, format & product

- **Follow-up**

- What's the next action and when? Think about this before the mtg.

Ways to Involve the User

- **Periodic reviews at “their place”**
- **Written (email, etc.) status reports**
- **Meet Me telecon for “regular” status meetings**
- **Invite user reps. to “up front” activities (SAMP Kickoff, SOO Workshop, etc)**
- **Identify user participants on SSET early (i.e., during RFP development) so they can “get on board”**
 - **Start asking for names when you start working on the RFP**
- ***Consistent “attendance” by user reps. is a must***
- **Fix problems swiftly**
 - **Inconsistent attendance, cooperation, responsiveness, etc.**
- **Don’t forget the “other users”**
 - **AFSPC/LG, SC, DO; ACC, Army, Navy, FMS**

These charts must be used in conjunction with ACE expert support

Schedule Alternatives

- **Network schedule (Microsoft Project)**
 - Comprehensive but hard for most people to use
- **Gantt chart (PowerPoint)**
 - Hard to maintain, but easy to read/use
- **Spreadsheet (Excel)**
 - Not as easy to read/use as PowerPoint
- **Milestone (Excel or Word) -- event & date**
 - Hard to show time frames and status
- **Combination**
 - Compromise ease of use with maintenance
 - Project (for details) + PowerPoint (for summary)
- ***Goal: Keep it current and accessible***

MS Project Schedule Template

- Initial outline of key events/tasks for typical acquisition
- Use as notional reference or tailor to your program
- Starts with ORD delivery and ends with contract award
- Tasks are grouped like Pre-Award Process (Top-Level) waterfall chart
- Includes over 100 typical tasks and events
- Includes AST Training modules
- Tailoring to your program requires:
 - Someone familiar with MS Project
 - Significant upfront investment of time
 - Commitment to maintain the schedule

Get buy-in and manage with it

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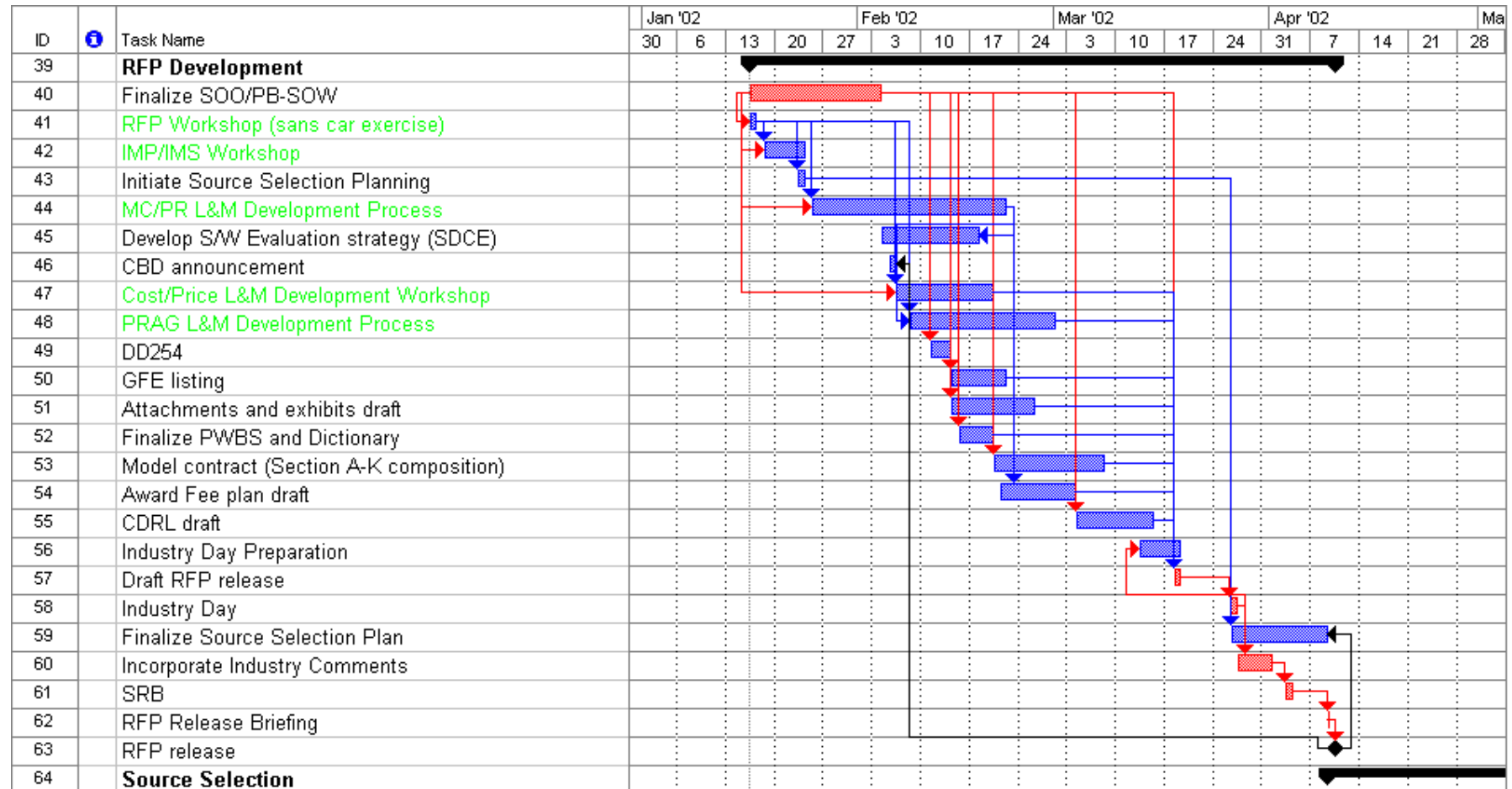
Template Limitations

- **Assumes ACAT 1 program events and Agency-level source selection**
- **Task durations are most-likely and based on anecdotal SMC history**
 - **Resource loading and acquisition program level (ACAT) can alter the durations**
- **Dependencies are built-in**
 - **Some are driven by regulatory or policy and should not be altered without waiver**
 - **Some are best practices and may be adjusted by your team**

Each program is unique - thoroughly vet with your team, AST and SPD

These charts must be used in conjunction with ACE expert support

Template Extract



These charts must be used in conjunction with ACE expert support

Steps to build real schedule

- **Schedule time for the RFP team to customize this schedule to their needs**
- **Walk thru the template tasks and discuss the dependencies**
- **Enter the start date for your activities. Check that Project has recalculated properly**
- **Review/edit each task, its duration, dependencies, start, and finish**
- **Add tasks as appropriate for your program, e.g. DAB, ORD approval, end of previous contract, SPO events, PEO briefs, budget decisions, etc.**
- **Add lower level details to tasks that are seen as moderate/high risk**
- **Assign people to each task**
- **Coordinate the summary schedule with higher management for guidance and buy-in**
- **Monitor and maintain the schedule**

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Workshop: Initial IPT Ground Rules

- **Summary: If your team members know what to expect, they can plan their support more efficiently**
- **Workshop Topics:**
 - How often are we going to meet? When? Regularly or as needed?
 - How do we involve the user(s)?
 - Two tiered meeting approach: inside/outside, different frequency, different purposes?
 - Telecon with other locations?
 - Fixed agenda, new agenda every time, fixed plus new business?
 - Meeting place: must have computer/projector setup (to do work)?
 - Schedule approach, update frequency, etc?
 - Action Items: tracking method, updating, communicating
- **Communicate, Communicate, Communicate**

Meeting frequency and format?

- **How often are we going to meet? Weekly?
Every 2 weeks?**
- **When (day and time)?**
- **Meeting location: must have
computer/projector setup (to do work)?**
- **How do we involve the user(s)? Telecons?
Review meetings with them? Regular emails?**
- **Agenda: Fixed agenda, new agenda every
time, fixed agenda plus new business?**
- **Who prepares the agenda? Who distributes?
To whom?**

Schedule approach?

- **Schedule approach?**
- **Update frequency?**
- **Location/Access?**

Action Items?

- **Action Items -- who maintains them?**
- **Who updates them?**
- **How are they communicated?**
- **When & how are they reviewed/tracked?**

Wrap-Up

- **Final comments by anyone?**
- **Follow through on the decisions you've made**
- ***Please fill out the feedback forms***